



IMPACT OF EV MANUFACTURING ON METALWORKING FLUIDS: OPPORTUNITIES AND CHALLENGES

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Electric vehicles (EVs), will soon be the leading category of vehicles sold in many parts of the world. EV manufacturing is different from internal combustion engine (ICE) manufacturing and the growth of the former will have a significant impact on the demand for metalworking fluids (MWFs). EV manufacturing will lead to a reduction in the number of components along with changes in manufacturing processes compared to ICE vehicles. This study will examine the impact of EV manufacturing on the MWF market besides providing an update on the overall market.

Scope



- Size and segmentation for MWF in select markets by demand by major fluid type and end-use industry
- Size and segmentation for MWFs employed in automotive (passenger vehicle) manufacturing by major fluid type
- Identification of MWF-intensive auto-component manufacturing
- Identification of metalworking processes affected by EV manufacturing
- Future market for MWFs used in automotive manufacturing
- Opportunities and challenges for MWF formulators and marketers

Regional Coverage



Asia-Pacific
Europe
North America

Features and Timing



Base Year: 2023
Published: February 2024
1st edition

**Comparison Between EV and ICE
Vehicle Architecture**

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Introduction

Metalworking Fluids Market Overview

- MWF market overview in 2023 by:
 - Demand in select country markets in key regions
 - Demand by fluid type (removal, forming, protecting, and treating fluids)
 - Demand by end-use industries
 - Competitive landscape
 - Emerging trends shaping MWF demand, and five-year forecast.

EV Manufacturing Overview

- Concise description of key market developments that are driving EVs sales
- Long-term (up to 2050) passenger vehicle sales/production projection.
- Analysis of emerging EV manufacturing processes and the potential effects on hardware size and materials used
- Identification of auto-components affected (eliminated/substituted/added) by EV manufacturing
- Description of supply chains at a regional level for key auto parts impacted by the e-mobility trend

Impact of EVs on MWF

- A regional overview of the automotive MWF market in 2050 under various scenarios including:
 - High EV impact scenario
 - Baseline EV impact scenario
 - Low EV impact scenario
- Regional MWF demand forecast in automotive manufacturing in 2050
 - Impact on four major fluid types (removal, forming, protecting, and treating fluids) due to changes in the vehicle architecture
 - Impact at a regional level for player operating in engine/engine parts manufacturing, ICE transmission system, EV electric motor, EV transmission system/parts, and EV battery and housing
- Opportunities and challenges by MWF type (removal, forming, protecting, and treating fluids)

NOTE: EVs in this report include only battery electric, hybrid electric, plug-in hybrid vehicles.

TABLE 1. COUNTRIES COVERED

North America	Canada, Mexico, and the United States
Asia	China, India, Indonesia, Japan, and South Korea
Europe	France, Germany, Italy, Poland, Spain, and the United Kingdom

SUBSCRIBER BENEFITS

This report serves as an excellent resource for manufacturers and formulators of MWFs to understand how the growing production of EVs will affect the MWF market. Specifically, this report assists subscribers by providing:



A snapshot of key MWFs markets by major fluid type, and end-use application



An assessment of EV manufacturing and its impact on MWFs in terms of major processes and auto-parts



A summary of emerging opportunities arising from the unique component manufacturing requirements of EVs

Methodology



Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

New and Improved Forecasts



Kline's new enhanced forecasting capabilities combines the power of advanced data science techniques and industry expertise to predict future market metrics. We analyze economic, demographic, social media, and consumer trend indicators to identify the factors driving growth. Our algorithms refine predications, and our automated processes provide the latest data for informed decision-making.

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